



# Purchasing Newsletter – April 2016

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Director

## **Reminder: Fiscal Year-End Memo**

Remember that the end-of-year closing for FY 15-16 is quickly approaching. The year-end cut-off letter is available on the Purchasing [website](#) and reflects various ordering deadlines through July 5. As conveyed in the memo, Purchasing makes every effort to process Shopping Carts/Purchase Requisitions received after the cut-off dates, but there is no guarantee that a purchase processed after a cut-off date will be against current year funds. It is imperative that Goods Receipts/Goods Confirmations be created in accordance with Deadlines 5 and 6 in the memo if the expenses are to be charged against current year funding. In addition, please review open encumbrances on any purchase orders that may need closed prior to June 30. Requests to release encumbrances can be directed to the Contracting Officer responsible for the specific purchase or email: [srmhelp@uky.edu](mailto:srmhelp@uky.edu).

## **New Order Form for Scott Gross**

For departmental users that prefer it, an updated, printable Order Form for Scott-Gross gas purchases is available for use and can be found [here](#). Scott-Gross offers an online store as its primary ordering platform; departments can place orders using the printable form, if preferred, via email or fax. Full instructions for using both the online store and printable form, along with other resources regarding Scott-Gross purchases, are available at the above link.

## **VWR Departmental Rebates**

VWR, International is currently distributing product rebates for calendar year 2015 to eligible departments for utilizing its e-catalog for order placements. As part of its agreement with the University, VWR offers a yearly product rebate directly to departments equal to 2% of their total purchases. Rebate letters include instructions for utilizing the credit to order free scientific products. Overall, departments earned \$28,000 in VWR product rebates during 2015. In addition, VWR provided \$150,000 in free freight/handling and departments saved an additional \$8,900 related to early payment discounts.

## **Upgrades to Dell e-catalog**

The Dell e-catalog will soon reflect an upgrade to enhance ordering features. Initial entry to the catalog will provide easier navigation among standard configurations, desktops/laptops, servers, accessories, etc. Shoppers will be able to customize systems reflecting real-time pricing and use extended search features. Estimated delivery times will be shown as well as shipping costs and the new site offers expedited delivery options. Once the Shopper checks out from the new Dell e-catalog, selected options and ordering details transfer back to SRM and populate for each item within line item notes. The Dell e-catalog reference guide, reflecting the enhanced features, is available on the Purchasing [website](#).

## **Steelcase e-Catalog**

A new e-catalog is available for Steelcase Furniture. Steelcase, via its local dealer Office Resources Inc. (ORI), is a leading provider of office furniture to the University. Most commonly purchased products (chairs, file cabinets, bookcases, tables, etc.) are available for ordering within the e-catalog. Shoppers can select from an array of colors, fabrics, and other options to customize items and place into their cart to order. An ORI representative will write customized quotes for larger, more complex orders for cubicles, etc. and place onto the e-catalog. Shoppers can locate their quotes by number on the catalog and transfer items into their Shopping Cart.

Purchases of Steelcase furniture by academic campus should be via Shopping Cart; procurement card is no longer permitted. If needed a step-by-step guide for the new e-catalog is available on the Purchasing [website](#).

Note for College of Medicine (COM) Shoppers: A customized catalog is under development specifically for COM and will be loaded mid-summer. In the interim, please continue the current applicable method for purchase of Steelcase products. COM utilizes a furnishings standards policy and only specific products/options may be purchased. The Steelcase representative for College of Medicine is Susan Durham, email [sdurham@oriusa.com](mailto:sdurham@oriusa.com). Note: Hospital areas do not currently use e-catalogs for Steelcase purchases.

## **Reminder: Set Values – Delivery Address**

Remember when beginning a new Shopping Cart to Set Values-Delivery Address as your first step and prior to selecting items. Shoppers must set their default building after receiving their role and prior to creating their first cart. As carts are created, building information loads automatically each time and the Shopper only completes the c/o person, floor, and room number. Bypassing default building setting or entering addresses via free hand will cause an order to fail or delivery to an incorrect location. If needed, a reference guide for setting and using Delivery Address is available on the Purchasing [website](#).

## **Resources for Shopping Cart and Purchase Order Reporting**

Two resources are available for departmental reporting:

**Shopping Cart Details Report**: Is available to both those holding the Shopper role (located via their dashboard) and others in accounting/reconciling areas (via myReports tab). Shopping Carts can be searched based on date range, cost object, creator, etc. and other criteria. Search results include Shopping Cart numbers, accounting references, items ordered, quantities, etc. The report reflects Shopping Cart data as it extracts directly from cart entries; it does not reflect purchase order or related data such as final invoice amount, freight, etc. A Quick Reference Guide is available [here](#).

**Business Analysis (BA) Report**: Is available via SAP using T-code ZMM\_BA\_RPT and provides purchase order data as goods and services are physically confirmed and invoiced. Report features include direct drilldown into the purchase order document, final invoice amounts, freight charges, etc. As with Shopping Cart Details, the Business Analysis report can be searched by the Link Blue ID of the Shopper creating the original cart. A Quick Reference Guide is available [here](#).

Users can export either report to Excel for closer review or manipulation as needed.

## **New Additions To Hospital Purchasing Staff**

New employees have joined the Hospital Purchasing team located within the Chandler Medical Center. The team conducts all purchases related to patient care for hospital and clinic areas.

- Stacey Earley was previously a STEPS employee and moved into a Contracting Officer position in November 2015. Stacey is available at 257-8892, email: [Stacey.early@uky.edu](mailto:Stacey.early@uky.edu).
- Dana Scheier was hired as a Contracting Officer in March and is from Berryville, VA. He can be reached at 323-5221, email: [drsc229@uky.edu](mailto:drsc229@uky.edu).
- Edward Kennedy was hired as a Contracting Officer in March as well and was previously employed with Boeing in Saint Louis, MO. He is available at 257-4330, email: [Edward.kennedy@uky.edu](mailto:Edward.kennedy@uky.edu).
- Louis Nicolosi began in April and is the new Procurement Manager for Hospital Purchasing. He previously worked for St. Ann's Community Healthcare Facility in New York. Louis' contact information is phone: 218-6796 or email: [lsni222@uky.edu](mailto:lsni222@uky.edu).

## **Recent Contract Awards**

Purchasing recently awarded contracts for the following goods and services:

<b>Contract</b>	<b>Title</b>	<b>Awarded Supplier</b>
UK-1656-16	Environmental Consulting, Remediation and Sample Collection and Analytical Services	Shield Environmental Associates, Inc.
UK-1637-16	Audit, Accounting, Tax and Consulting Services	BKD, LLP
UK-1619-16	Endowment Investment Manager: Diversified Inflation Strategies	Various (Contact Purchasing if needed for more information)
UK-1649-16	Facility Cleaning for Kentucky Regional Extension Center	Commonwealth Cleaning
UK-1658-16	Furniture Price Contracts	Various (Contact Purchasing if needed for more information)

**Question:** What is the end-of-year Cutoff Memo and what is the meaning of the deadlines?

**Answer:** The University's official business year runs from July 1 through June 30. As the end of the fiscal year approaches, purchases on current year funds must be ordered, physically received, and accounted for within the SAP/SRM systems prior to close of business on June 30. (Typically, this applies to purchases on cost centers more so than grants; check your business officer for clarification if needed.) Goods that are ordered within the current fiscal year, but physically received or accounted for after July 1 post to new fiscal year funding.

Deadlines for ordering goods and services begin in April of each year and correlate with potential length of time needed to conduct the purchase and for the good(s) to be delivered by June 30. For instance, April 4 is the first deadline for FY 2015-16 for fiscal year-end ordering and pertains to lease purchases, equipment, and vehicles. These goods/services represent the most complex purchases and may require bids or other processes prior to ordering and physical delivery, thereby requiring the longest processing time. Other deadlines in the year-end memo relate to purchases of less complexity and therefore, goods may be ordered closer to June 30.

## **Self-enroll to Receive Purchasing ListServ Notifications**

Follow these instructions to self-enroll to the Purchasing ListServ and receive procurement-related updates and news. Send e-mail to [LISTSERV@lsv.uky.edu](mailto:LISTSERV@lsv.uky.edu) with the following text in the message body:

subscribe UKPURCHNEWS Yourfirstname Yourlastname

The subject line should be blank as well as the body of the email. You may unsubscribe in the same manner, by changing "subscribe" to "unsubscribe" and following the remaining directions.